

# MADINAH



Destination Report

20  
25

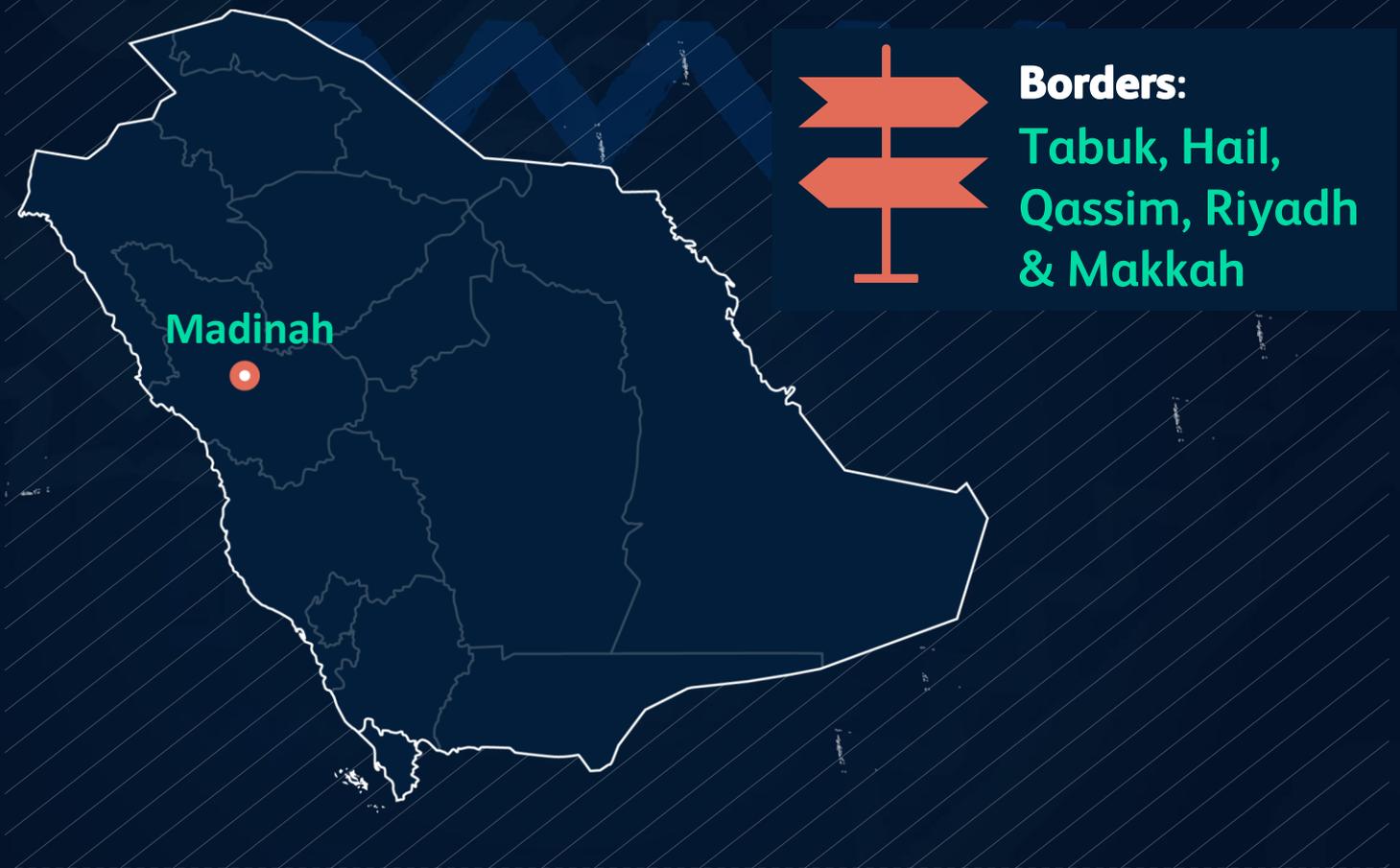
Tourism صندوق  
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# MADINAH

## City of Spiritual Tranquility

Al Madinah Al Munawwarah is a home to one of the Two Holy Mosques and the second holiest site in Islam, making it a key destination for millions of pilgrims traveling to Saudi Arabia for Hajj or Umrah. The city is centered around Al Masjid an Nabawi and is where the Prophet Muhammad (PBUH) lived and taught after the migration from Makkah in 622 A.D., called Hijrah, marking the start of the Islamic calendar. Due to the Islamic historical significance of the city, a trip to Madinah is a lifelong dream for many Muslims around the world.



Population **2022**

**2,137,983**





Winter	8 - 26 ° C
Spring	18 - 41 ° C
Summer	26 - 45 ° C
Autumn	19 - 38 ° C

36%

Ages < 30



## Proximity to Nearby Cities

Madinah has adequate transportation accessibility composed of roads connected to major highways and three international airports (Madinah city, Yanbu, AlUla). Additional transportation projects are being developed to improve accessibility and increase connectivity between Madinah with other cities.

### Driving



### Flying



Source : SAMA, Ministry of Tourism, GASTAT, Visit Saudi, TDF Analysis

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# Key Highlights



01

**The second holiest city in Islam** provides Madinah with an influx of pilgrims with capacity set to be increase to 30 Mn.

02

Ongoing developments to leverage cultural and heritage tourism flows to **drive leisure tourism growth**, which is already among the fastest-growing tourism segments for Madinah.

03

Diverse portfolio of **unique cultural & historical assets** and wide array of **natural assets**, from 300 km of Red Sea coastline, volcanoes, caves, and more.

04

**Well developed road, air, and sea accessibility**, with two international airports in Madinah and Yanbu (and a third in AIUla) and high connectivity through the Haramain Railway.

05

Opportunity to strengthen **Yanbu's integration city into cruise industry** highlighting its **beaches, diving spots, fishing industry, and more.**

06

**Limited supply of entertainment offerings** within the region is a significant opportunity for the sizeable local market and year-long flow of religious visitors.

07

**Opportunity to develop unique entertainment offerings** due to limited offerings despite modest population and tourism flows in Madinah and Yanbu.

08

Opportunity for **mixed-use and quality retail offerings** and retail landscape, currently limited to community malls & traditional local markets.

09

**Limited offerings to cater to** the fast-growing tourism segments, such as **leisure** in accommodation, F&B, retail, and entertainment and shift towards middle-income tourists.

Source : MT, TDF analysis

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# Tourism Landscape (2024)

01

## Continued Visitor growth in 2024<sup>1</sup>

**Madinah** visitors continued to grow in 2024 and have almost reached pre-pandemic levels and exceeded 2019 levels.

**\*18** Mn

Total Overnight Visits in 2024

02

## Domestic Visits and Spend Grew while Inbound Decreased

Madinah's domestic visitors and spending witnessed **13% & 15%** YoY growth while inbound visits fell by **6%**. Domestic dominates tourism flows due to Madinah being primarily a secondary visit destination for inbound travelers.

**97%**

Share for domestic visitors of all Madinah's visits

03

## April, June, and November marked Peak Months

Madinah has relatively stable seasonality due to continuous flow of heritage tourism, which usually includes Madinah as a secondary destination after Makkah.

**30%**

of visits occur in April, June, and November

04

## The Main Travel Purpose is Heritage Tourism

Religious visitors are the main contributor to the tourism landscape accounting for **84%** of total visits.

**84%**

of visits driven by Religious

05

## Families Make Up the Main Visitor Profile

Madinah is a largely **family destination** with the average party size of **3.2 to 3.7**. Average length of stay for domestic visitors was much shorter than inbound.

**3.2 – 3.7**

Average party size in 2024

06

## F&B, Transportation, and Accommodation

**F&B, Transportation, and Accommodation** were the top tourism spend segments accounting for **85%** of total spend. **Transportation** was among the **fastest growing** segments in 2024.

**85%**

of total spend from F&B, Transport, and Accommodation

07

## Bahrain, Egypt, and UAE Are the Top Source Markets

**Bahrain** accounted for **48%** of total inbound visits, while **Egypt** and **UAE** accounted for **17%** and **13%**.

**78%**

of inbound visits from Bahrain, Egypt, and UAE

Source : Ministry of Tourism, TDF Analysis <sup>1</sup> Data is for domestic and inbound. \*Includes both Primary and Secondary Overnight visits

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# Key Upcoming Projects

Non-Exhaustive



## Rua Al Madinah

Rua Al Madinah is a PIF led project located within walking distance of key religious sites in AlMadinah and will feature 63% of open spaces. The project will be opened in phases with an announced 47,000 hotel keys.

Stage:	Execution
Value:	37,000Mn \$
Completion (estimate)	Q3 2030
Site Area BUA	1.5 Mn m2 4.9 Mn m2
Key Components	Hotels & Residential Retail and F&B



## Knowledge Economic City

Knowledge Economic City Developers Company (KECD) is developing KEC with aims to attract information technology companies, education, and health centers.

Stage:	Execution
Value:	8,000Mn \$
Completion (estimate)	Q1 2029
Site Area	450K m2
Key Components	Residential Hospitality F&B, Retail



## Bus Rapid Transit (BRT)

The project focuses on providing a sustainable Bus Rapid Transit system to meet the growing demand for public transportation across three transit lines.

Stage:	Execution
Value:	177 Buses Main & Secondary Stops 15 Primary Routes
Key Components	



## Heart of Uhud

Al Mqr Development Company is developing a health resort called "Heart of Mount Uhud" with medical clinics, rehabilitation centers, and wellness offerings.

Stage:	Design
Value:	533Mn \$
Completion (estimate)	Q3 2028
Site Area	240,000 m2
Key Components	Medical/ F&B Hospitality

Source: Information gathered from TDF analysis, publicly available information, and third-party providers such as Global Data and information is subject to change

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# Key Upcoming Projects

Non-Exhaustive



## Meshraf Development

Al Mqr Development Company is developing a mixed-use project featuring residential, commercial, and public parks.

Stage:	Execution
Value:	387Mn \$
Completion (estimate)	Q4 2027
Site Area	700,000 m <sup>2</sup>
Key Components	Residential Commercial Public Parks



## SEVEN Madinah

Saudi Entertainment Ventures Company (SEVEN) is planning to develop an entertainment complex in AlMadinah near King Fahd Central Park, featuring six distinct entertainment zones.

Stage:	Execution
Value:	346Mn \$
Site Area BUA	76,500 m <sup>2</sup> 84,000 m <sup>2</sup>
Key Components	Entertainment Retail F&B



## Airport Expansion – Phase II

Saudi Arabian General Authority for Civil Aviation (GACA) is undertaking the second phase of the Madinah Airport expansion to increase passenger capacity from 8 million to 17 million.

Stage:	Execution
Value:	300Mn \$
Completion (estimate)	Q4 2027
Site Area	40,000 m <sup>2</sup>
Key Components	Terminal Expansion New Terminal



## Sayyid Al-Shuhada Square Development Project

The project focuses on developing a central plaza adjacent to Mount Uhud with the aim of enhancing the visitor experience and improving accessibility and movement within the area.

Stage:	Construction
Cost:	412,000,000
Completion (estimate)	Q1 2029
Leasable Area	25,000 m <sup>2</sup>
Key Components	Enhancing the visitor experience and improving the quality of access and movement."

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# Value Proposition



## Religion & Heritage

Home to the 2<sup>nd</sup> holiest city in Islam, Madinah is home to many important religious sites, historical & cultural sites, and is a dream destination for around 2 billion Muslims globally. The Haramain High-Speed Rail Project also provides connectivity to Jeddah, Makkah, and KAEC.



## Recreation

The region has diverse landscapes that provide ample opportunities for recreation, such as diving in the Red Sea near Yanbu, beautiful beaches for water-activities, local farms, and traditional souqs & bazaars near unique sites.



## Nature

The region's mixed topography includes caves, mountains, beaches, and volcanoes making it appealing for hiking, sight-seeing, and nature lovers. The region is also famous for its large date farms and other local produce.

Source : MT, TDF analysis

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# Religion & Heritage

Non-Exhaustive

Madinah is the second holiest city in Islam, home to the Prophet's Mosque, as well as other religious and historic sites. It also hosts numerous museums and historical monuments.



## Al Masjid An Nabawi

**Second holiest site in Islam** drawing millions of visitors annually. The mosque lies in the center of the city of Madinah and dominates the urban landscape of the city, which is built around it in a set of concentric roads.



## Quba Mosque

Considered the **first mosque in Islam** and was built after the hijrah was completed by the Prophet (PBUH) and his followers from Makkah to Madinah in 622 AD. The mosque is the top attraction for visitors after the Prophet's Mosque and is often a stop on the Hajj and Umrah pilgrimages.



## Mount Uhud

Mountain located to the north of the city of Madinah, standing over 1,000m tall and 7.5km wide. The land around Uhud was the site of the **second great battle between the Muslims and Quraish in the early 7<sup>th</sup> century** and was the site of their first defeat.



## Dar Al Madinah Museum

Dar Al Madinah is a museum that showcases over 2,000 heritage and historical exhibits, including the evolution of Al Masjid an Nabawi over the years. The museum also features the Hejaz Railway exhibit, which commemorates its historical significance and the vital role it once played in serving pilgrims traveling to the holy sites.

Source: MT, Visit Saudi, Publicly available sources, and TDF analysis.

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# Recreation

Non-Exhaustive

Diverse landscapes provide opportunities for recreation, such as diving in the Red Sea, a buzzing traditional retail scene, various parks to enjoy a stroll, and touring date farms.



## Red Sea Diving and Water Activities

Yanbu is home to majestic marine life and a lively diving community. Even in winter, the water does not fall below 20 degrees Celsius. Within it lies the **Seven Sisters Coral Reef, Abu Galawa island** with nearby coral grottoes, sharks, and a wide variety of above-water bird-watching and fishing activities at **Yanbu Waterfront**.



## Ras Al Abyad Beach

The Ras Al Abyad Beach (Coastal White Head) is located two hours away from AlMadinah and is known for its **pristine beaches**. The beach was one of the main destinations for people that were on the luxurious Red Sea Silver Spirit Cruise. There is ample opportunity to provide new beach and water activities (water sports, boat tours, diving, etc.)



## Date Farms

Madinah is famous for its dates, and its **date farms** produce large volumes and many varieties of products that are sold in local markets. They are also known for their culinary delights that incorporate products, such as dates and **mint**.

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# Nature

Non-Exhaustive

Mixed topography such as caves, mountains, beaches, and volcanoes makes it attractive for hiking, sight-seeing, and nature lovers.



## Harrat Khaybar

Volcanic field north of Madinah known for its marvelous **black dry lava formations** on the ground and unique topography. It covers an area of 12,000 km<sup>2</sup> and includes several sites such as **Ras Al Abyad Mountain** and **Umm Jersan Cave**.



## Jabal Ayr

One of the most prominent geographical and historical landmarks in Madinah. This majestic mountain was designated by Prophet Muhammad as the southern boundary of the Prophet's Mosque. It is located in the southwest of Madinah, east of Wadi Al-Aqiq and near the Dhi Al-Hulifah area.



## Radwa Mount

Located in **Yanbu**, Radwa Mount is a colossal icon that stands **2,282 meters tall**. Its jagged peaks and unique red color have inspired many Arabic poets. It's located in the AlNakhil range, which is known for its **honey and wildlife**, including wolves, lynx, tigers, and ibex.



## Al Aqeeq Valley

One of the most famous valleys of Medina, where the water gathers from Al-Naqi'e area, over 100km away from Medina to the south. It is adjacent to the outskirts of Medina, reaching Mount 'Ayr

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# Connectivity

## Air Transport

Al Madinah Al Munawwarah region is served by three international airports around Al Madinah City, Yanbu, and AIUla. The Prince Mohammed Bin Abdulaziz International Airport (Madinah Airport) is expected to increase annual capacity through its upcoming expansion project.

### Number of Passengers (Arrival, 2024)



Out of a total 64.8 million arriving passengers, **Madinah Airport** accounts for approximately **9% of all passengers**.

### Number of Flights (Arrival, 2024)



Out of a total 452 K arriving flights, **Madinah Airport** accounted for **8% of total flights**.

Source: GACA, TDF Analysis

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